

## THE APPOINTMENT SYSTEM: Changes in Applying for Assistance

The Department of Health and Human Services (DHHS) ACCES Front Door Project has ambitious goals that include enhancing ease of service delivery, improving accuracy, boosting staff satisfaction and reducing the waiting period for benefits. One project underway is targeted to meet all of those goals! A new "Appointment System" has been implemented by the Division of Family Assistance (DFA), the division within the Department where individuals and families go to apply for Food Stamps, TANF, medical assistance and other assistance programs.

### The Old System

Prior to the new Appointment System, clients visiting most District Offices (DO's) around the state to apply for assistance would find the office staff busy with other clients. The client would often be given a "30 day letter," that would enable them to return to the office within 30 days. The 30-day letter gave the client priority in being seen upon their return visit but it was not an actual appointment with a specified person, date and time. If a client returned on a busy day they would still have to wait in line to be seen and if they arrived late in the day it is possible that an interview could not be concluded due to time limitations. Clients sometimes had to return to the District Office more than once to complete an interview and provide the information necessary to apply for assistance. The 30-day letter was helpful in many regards but it was imperfect.

### The New System

The newly developed Appointment System is more than the name implies. Each aspect of the intake process was carefully considered and the Appointment System was established. Each client that comes in to the DO to apply for assistance is scheduled for an appointment with a Family Service Specialist (FSS). Prior to the new system, clients often waited in line just to receive a 30-day letter for them to return weeks later and wait again. For FSS's under the old system, they were called on to meet with clients ad hoc and could not plan their workday. Here is the new Appointment System at a glance for clients applying for assistance:

- A Clerical staff gives a client a form to fill out in the lobby
- A Clerical staff collects the form and registers the client then gives them two papers:
  - 1) An Appointment within 2 days time, with an FSS name, a date and a time
  - 2) A list of the documents needed to complete the application (for the return appointment)
- A Client may be eligible for expedited review on the day they first visit the DO due to their transportation needs or other considerations

### A District Office Visit

I visited one District Office to hear first hand from clients and staff how the Appointment System was working out. Here is what they shared.

"Everything seemed to flow real smooth."

### Clients

One couple visited the office early in the week to apply for Food Stamps. A Clerical staff member registered them, gave them a list of documents to bring back to their appointment and gave them an appointment slip to return two days later. I asked if they minded returning for an appointment and they shared that they come into town enough that it was no trouble. They also shared that when they came in for their appointment they were seen promptly and their actual appointment took only 30 minutes. Because they brought everything they needed for their interview, their case was opened that day, the same day they applied. They were also notified of the benefit amount that they would receive and the date that they would begin receiving benefits. Both expressed surprise when they learned that they would receive benefits within only a few days. One client explained, "Everything seemed to flow real smooth."

### Clerical Staff

I met with Nancy, a Clerical staff member who has been working in the District Office for more than thirty years. She shared helpful, matter-of-fact information. She emphasized the need to address client traffic. She explained simply, "The District Office has a line of clients going out the door most of the time." Office hours are not limited, they span 8 - 4:30, every weekday. Clients are served constantly during that time but the old system was not responding well to the demand. Clients were doing a lot of waiting. She also shared with upbeat honesty that changing over to the new system wasn't easy. Many small changes needed to occur besides establishing appointments. For clerical staff, job duties did not change but the flow of duties

changed. Clerical perform client registration. With the new system, all client registration is performed right away, when the client first comes in, while previously some portion could be handled at some later time in the back office. Now that the Appointment System has been in operation for a few weeks Nancy says it works well. "Clients are seen within 15 minutes of their appointments." She says it addresses walk-ins and client flow. The key is to keep working on refining it.

### Family Service Specialists

I also met with Scott, a DFA Family Service Specialist. Scott's duties include interviewing clients who apply for benefits, processing complex cases and performing case reviews. Scott reiterated the point that client traffic continues to climb and on that point the old system had plenty of drawbacks. It was a struggle for FSS's to perform all of their duties. With constant workday interruptions it was particularly difficult for FSS's to attend to their more time consuming duties like processing and reviewing complicated cases. Every day was full and FSS's were essentially "on call" to meet with clients any time during the day. The new system does not change the number of clients but it provides helpful structure. With the new system all client appointments for the whole week are established. Scott can look in the computer and visualize his day or his week and by seeing his appointments he can also see where he has time available to perform case reviews and other work. For the first time he can plan his work day and work for periods of time without interruptions.

Another significant benefit of the new system is improved client preparation. Scott explains that clients are provided a list of the documents they need to bring with them when they come in to their appointment in order to complete their application. With that information in hand they attend their appointments well prepared and this saves **everyone's** time. This "Trickle Down" effect has been observed in District Offices around the state. When a client comes in prepared, cases can open right away and cases are opening faster under the appointment system. Quicker opening of cases saves on support staff time because staff is no longer spending time processing information that is dropped off or mailed in for those cases. Support staff is also no longer fielding questions or calls from clients with documentation questions in those cases. Early preparation also helps to eliminate the need for additional client appointments that would otherwise be necessary to open the case, thus saving both client and staff time.

Scott gives the Appointment System high marks. He sees just as many clients each day, some days even more than he did before the new system, but he experiences less interruptions over the course of the day so he can accomplish more work. He also finds he is completing more case openings at the client's initial interview. Scott is also honest and a realist. It isn't a perfect system. Like any good system you can always refine it to make it better or adapt to changes over time. Also, in each District Office the office layout and staffing is a little different.

### Continuous Improvement

The key to a successful improvement project is to build in continual review and improvement to ensure that the project continues to meet project goals. Early signs indicate positive results from the Appointment System as follows:

- Reduced time period for clients awaiting interview, down from 30 days to 2 days
- Reduced client No-Show rate for appointments, down from pre-Appointment System rate
- Increased staff satisfaction due to greater structure in workday and less interruptions
- Increased customer satisfaction due to reduced waiting times when they arrive in the DO
- Reduced waiting times for benefits is anticipated due to increased client preparedness at interview

Accuracy has not been reviewed at this early date but FSS's are now performing case reviews for accuracy at a higher frequency than they were prior to the Appointment System. This additional review is expected to positively impact accuracy.

DFA will be monitoring the new system to ensure that it has a positive impact on project objectives. The Appointment System has been implemented statewide but has been operational only a couple of months. Management and staff are continuing to make adjustments for optimal operation. The Appointment System has required broad staff support and it appears to be working well because it is helpful to clients and staff. This is just one improvement project making a positive difference at DHHS. Stay tuned for others.

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